MARYLAND JUDICIARY

GEARS
General Enterprise And Resource Support

Quick Reference Tip Sheet
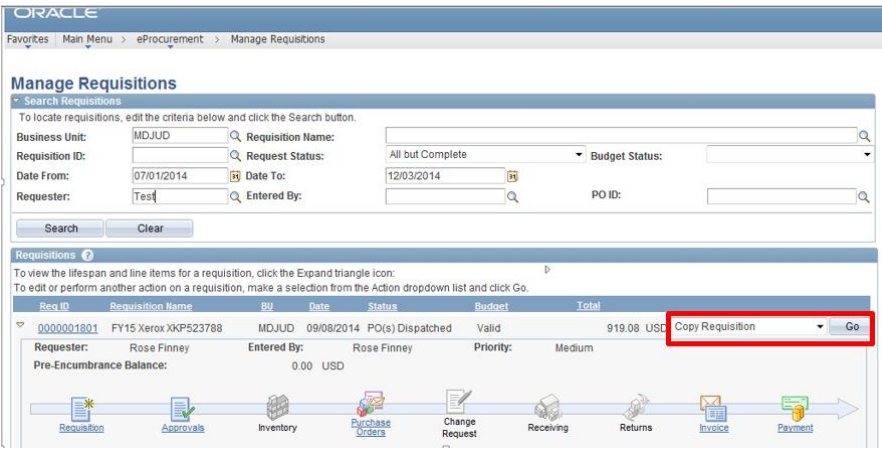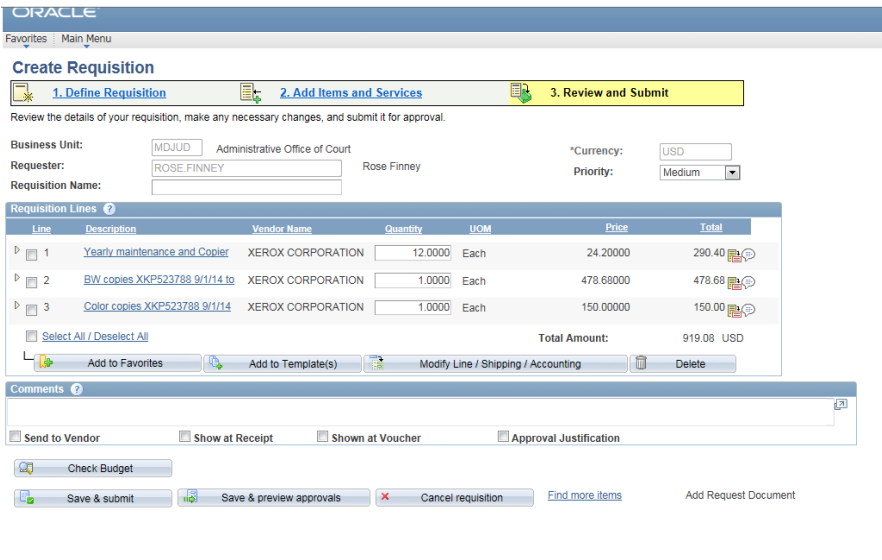
<mark>NEW: 01/05/2015</mark>
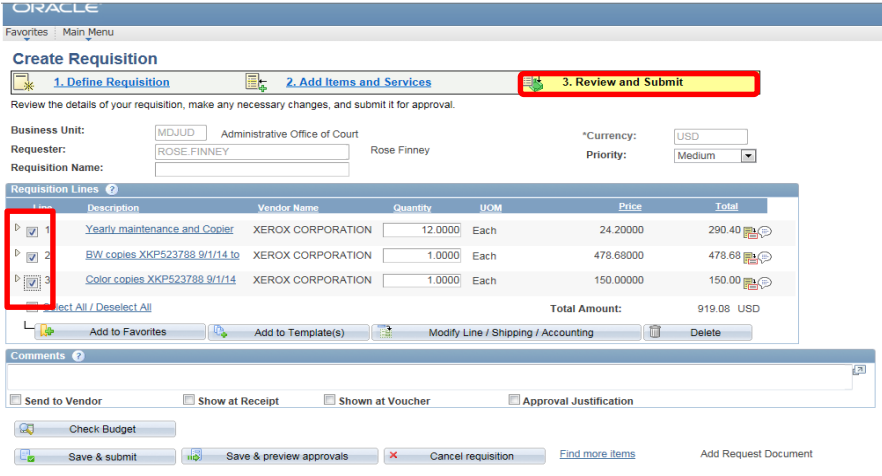
General Information

Task	Process Information
Creating a Requisition Template (for Recurring Requisitions)	**NOTE: As a prerequisite, please see the tip sheet for "Creating an eProcurement Requisition".** Once created, an ePro Requisition and the associated line items can be saved as a template for recurring use. NOTE: Templates are unique/personal to a Requester. Use of a Template is the preferred method for recurring orders. The Copy Requisition method is an alternative, though <u>not</u> recommended because unwanted information may be unintentionally included. For example, you would not want the old Buyer Name to be carried forward on the new requisition, as this could delay/prevent sourcing to a purchase order. The Template method will default the Buyer to "Field_Buyer" (or blank), so your new requisition can be assigned to a Procurement Buyer and then sourced to a purchase order.

GEARS Navigation

eProcurement > Manage Requisitions	ORACLE Favorites | Main Menu > eProcurement > Manage Requisitions

## 1.0   Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	**A.** Find the requistion to be used as the source. (NOTE: Use the fields in the Search Requisitions section to narrow your search results). **B.** Choose "Copy Requisition" from the dropdown. **C.** Click the Go button.	
2.	The requisition will be copied, and the Create Requistion page will open.	
3.	On the **3. Review and Submit** tab, choose the lines to be saved on the template.	
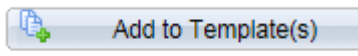
4.	**Click the** **button.** **Information carried over for each requisition line includes: Description, Vendor, Quantity, UOM, Price, Location, and Account.** **NOTE: Account is the only chartfield stored on the template.**	
5.	**Enter a Template Name and Description, and then click the** OK **button to save the template.** **NOTE: Make the Name and Description meaningful, so you can easily identify the template later.**	
6.	**You can cancel this requisition.** **NOTE: This action cancels the Requisition, but not the Requisition Template.**	
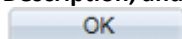
| 7. | When you receive the cancel message, click the [OK] button.

NOTE: This action cancels the Requisition, but not the Requisition Template.

DONE! When you are ready to order the same goods again, you can use your new template! | **Message**

This will cancel your entire requisition. Are you sure you want to do this? (18036,94)

OK   Cancel |

🛑 **Important**

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.